

We are currently updating our site; thank you for your patience.

CONTRACT

CONTRACTS – EDIT

Contracts give you the ability to effectively manage your customer billing.

Contracts can only be edited when in the **New** or **Active** states.

If certain amendments are done on an Active contract, it will move back to **Released** state, to be checked and **re-approved**.

An email will be sent to all users who have the rights to authorise (i.e. [Release](#) and [Approve](#)) a contract.

The types of changes that would trigger the contract to be placed back into the **Released** state include:

- Change Contract Type
- Change Customer
- Aggregate Billing flag
- If any contract item is added
- If any contract item is removed
- If any contract item fee is added
- If any contract item fee is removed
- Change of Billing Customer on a fee
- Change of Billing Customer on a meter

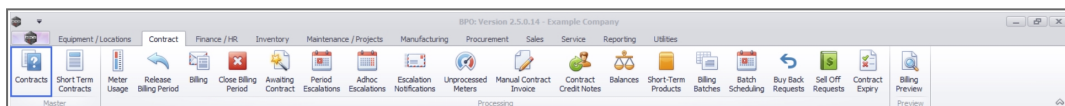
And if the following types of changes are made to the Contract Item Fees:

- Amount
- Start Date
- End Date

- Escalation %
- Account Code
- COS Account Code
- Invoice Description
- Billing Period
- Billing Cycle
- Finance Party
- Finance Amount

Note: As you can only edit a contract in the **Active** or **New** status - the contract you wish to edit will either be in this state or the New State.

Ribbon Select **Contract** > **Contracts**



The **Contract Listing** screen will be displayed.

Select the Site

Your employee user record should be linked to a default site. In this case, the site will auto populate with this default, otherwise the site must be manually selected.

Another site can be selected, if required, and if you have the security rights to access the site.

If **All Sites** displays here, then you do not have a default site configured on your user record, and need to select the required site.

Upon opening, this screen will default to the **Active** status, listing all the **Active** contracts for the selected site.

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Durban

Active

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Credit Notes

Drag a column header here to group by that column

ContractNo	CustomerC...	CustomerName	CustomerD...	ContractType	ContractTy...	Location	OrderNo	StartDate	EndDate	Department...	Period	PeriodType...	BillingCycle...	BillingPeriod	Bills
CO0000009	DER001	Derton / Technologies		CPC	Cost Per Co.	Durban Area		07/05/2014	07/05/2019	Sales Depar...	60 Months	Months	Months	3	
CO0000016	TIA001	Titan Group		CPC	Cost Per Co.	Main		13/06/2014	13/06/2019	Sales Depar...	60 Months	Months	Months	4	
CO0000018	SAM001	Samanthas Diner		CPC	Cost Per Co.	Main		09/07/2014	09/07/2019	Sales Depar...	60 Months	Months	Months	5	
CO0000019	OFF001	Office Supplies Unlimited		CPC	Cost Per Co.	Main		28/07/2014	28/07/2019	Sales Depar...	60 Months	Bi-annual	Months	6	
PC0000001	DAN002	Dancing Shoes		PBE	Prepaid Con.	Kloof	test	23/03/2016	23/03/2021	Sales Depar...	60 Months	Months	Months	1	
CO0000031	YEO001	Young Electric		CPC	Cost Per Co.	Hillcrest		24/03/2016	24/03/2021	Sales Depar...	60 Months	Months	Months	1	
CO0000041	PAN001	Panda Copiers		CPC	Cost Per Co.	Main		05/07/2016	05/07/2021	Sales Depar...	60 Months	Months	Months	5	
CO0000042	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Main		07/09/2016	07/09/2022	Sales Depar...	60 Months	Months	Months	7	
CO0000043	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Main		01/08/2016	07/09/2021	Sales Depar...	60 Months	Quarterly	Months	5	
CO0000052	HOP001	Hope Works (Pty) Ltd		PBE	Prepaid Con.	Durban Area		29/05/2017	29/05/2022	Sales Depar...	60 Months	Months	Months	3	
CO0000054	APP001	Apple Juice Inc		CPC	Cost Per Co.	Durban Area		03/08/2017	03/08/2022	Sales Depar...	60 Months	Months	Months	0	
CO0000072	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Durban Area	1234	07/03/2018	07/03/2023	Sales Depar...	60 Months	Months	Months	2	
CO0000073	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Durban Area		29/05/2018	29/05/2023	Sales Depar...	60 Months	Months	Months	0	
CO0000074	DER001	Derton / Technologies		CPC	Cost Per Co.	Durban Area	1234	15/06/2018	15/06/2023	Sales Depar...	60 Months	Months	Months	6	
CO0000077	PRN001	Pink Shoes		CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depar...	60 Months	Months	Months	4	
CO0000078	PRN001	Pink Shoes		CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depar...	60 Months	Months	Months	4	
CO0000080	OFF001	Office Supplies Unlimited		CPC	Cost Per Co.	Durban Cen...	1234	06/05/2020	06/05/2020	Sales Depar...	60 Months	Months	Months	2	
CO0000082	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Durban Area		10/09/2019	10/09/2024	Sales Depar...	60 Months	Months	Months	7	
CO0000079	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depar...	60 Months	Months	Months	4	
CO0000083	WES001	Westwood Dynamic		CPC	Cost Per Co.	Durban Area	1234	15/10/2019	15/10/2024	Sales Depar...	60 Months	Months	Months	8	

Open Windows

User: Blencoe 21/10/2022 Version: 2.5.0.14 Example Company

SELECT THE CONTRACT

- Select the **row** of the **contract** that you wish to process.

Contract Listing

BPO: Version 2.5.0.14 - Example Company

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Approve Closure

Online Closure

Close Contract

Find Serial No.

Find Contract

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Status Processing

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Drag a column header here to group by that column

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Credit Notes

ContractNo	CustomerC...	CustomerName	CustomerD...	ContractType	ContractTy...	Location	OrderNo	StarDate	EndDate	Department...	Period	PeriodType...	BillingCycle...	BillingPeriod	Bills
CO0000009	DER001	Derton / Technologies		CPC	Cost Per Co.	Durban Area		07/05/2014	07/05/2019	Sales Depar...	60 Months	Months	Months	3	
CO0000016	TIA001	Titan Group		CPC	Cost Per Co.	Main		13/06/2014	13/06/2019	Sales Depar...	60 Months	Months	Months	4	
CO0000018	SAM001	Samanthas Diner		CPC	Cost Per Co.	Main		09/07/2014	09/07/2019	Sales Depar...	60 Months	Months	Months	5	
CO0000019	OFF001	Office Supplies Unlimited		CPC	Cost Per Co.	Main		28/07/2014	28/07/2019	Sales Depar...	60 Months	Bi-annual	Months	6	
PC0000001	DAN002	Dancing Shoes		PBE	Prepaid Con.	Kloof	test	23/03/2016	23/03/2021	Sales Depar...	60 Months	Months	Months	1	
CO0000031	YEO001	Young Electric		CPC	Cost Per Co.	Hillcrest		24/03/2016	24/03/2021	Sales Depar...	60 Months	Months	Months	1	
CO0000041	PAN001	Panda Copiers		CPC	Cost Per Co.	Main		05/07/2016	05/07/2021	Sales Depar...	60 Months	Months	Months	5	
CO0000042	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Main		07/09/2016	07/09/2022	Sales Depar...	60 Months	Months	Months	7	
CO0000043	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Main		01/08/2016	07/09/2021	Sales Depar...	60 Months	Quarterly	Months	5	
CO0000052	HOP001	Hope Works (Pty) Ltd		PBE	Prepaid Con.	Durban Area		29/05/2017	29/05/2022	Sales Depar...	60 Months	Months	Months	3	
CO0000054	APP001	Apple Juice Inc		CPC	Cost Per Co.	Durban Area		03/08/2017	03/08/2022	Sales Depar...	60 Months	Months	Months	0	
CO0000072	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Durban Area	1234	07/03/2018	07/03/2023	Sales Depar...	60 Months	Months	Months	2	
CO0000073	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Durban Area		29/05/2018	29/05/2023	Sales Depar...	60 Months	Months	Months	0	
CO0000074	DER001	Derton / Technologies		CPC	Cost Per Co.	Durban Area	1234	15/06/2018	15/06/2023	Sales Depar...	60 Months	Months	Months	6	
CO0000077	PRN001	Pink Shoes		CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depar...	60 Months	Months	Months	4	
CO0000078	PRN001	Pink Shoes		CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depar...	60 Months	Months	Months	4	
CO0000080	OFF001	Office Supplies Unlimited		CPC	Cost Per Co.	Durban Cen...	1234	06/05/2020	06/05/2020	Sales Depar...	60 Months	Months	Months	2	
CO0000082	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Durban Area		10/09/2019	10/09/2024	Sales Depar...	60 Months	Months	Months	7	
CO0000079	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depar...	60 Months	Months	Months	4	
CO0000083	WES001	Westwood Dynamic		CPC	Cost Per Co.	Durban Area	1234	15/10/2019	15/10/2024	Sales Depar...	60 Months	Months	Months	8	

Open Windows

User: Blencoe 21/10/2022 Version: 2.5.0.14 Example Company

- Click on the **Edit** button.

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Enter text to search...

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Contract Listing - BPO: Version 2.5.1.4 - Example Company

ContractNo

CustomerC...

CustomerName

CustomerD...

ContractType

ContractTy...

Location

OrderNo

StarDate

EndDate

Department...

Period

PeriodType...

BillingCycle...

BillingPeriod

Bills

CO0000012

TIA001

Titan Group

CPC

Cost Per Co...

Durban Area

16/05/2014

16/05/2019

Sales Depar...

60 Months

Months

Months

3

CO0000016

TIA001

Titan Group

CPC

Cost Per Co...

Main

13/06/2014

13/06/2019

Sales Depar...

60 Months

Months

Months

4

CO0000018

SAM001

Samanthas Diner

CPC

Cost Per Co...

Durban Area

09/07/2014

09/07/2019

Sales Depar...

60 Months

Months

Months

5

CO0000019

OFF001

Office Supplies Unlimited

CPC

Cost Per Co...

Main

28/07/2014

28/07/2019

Sales Depar...

60 Months

Bi-annual

Months

6

CO0000031

YES001

Young Electric

CPC

Cost Per Co...

Hillcrest

24/03/2016

24/03/2021

Sales Depar...

60 Months

Months

Months

1

CO0000041

PAN001

Panda Copiers

CPC

Cost Per Co...

Main

05/07/2016

05/07/2021

Sales Depar...

60 Months

Months

Months

5

CO0000043

HOP001

Hope Works (Pty) Ltd

CPC

Cost Per Co...

Main

01/08/2016

07/09/2021

Sales Depar...

60 Months

Quarterly

Months

5

CO0000072

HOP001

Hope Works (Pty) Ltd

CPC

Cost Per Co...

Durban Area

1234

07/03/2018

07/03/2023

Sales Depar...

60 Months

Months

Months

2

CO0000074

DER001

Derton / Technologies

CPC

Cost Per Co...

Durban Area

1234

13/06/2018

13/06/2023

Sales Depar...

60 Months

Months

Months

6

CO0000077

PPH001

Pink Shoes

CPC

Cost Per Co...

Durban Area

18/06/2018

18/06/2023

Sales Depar...

60 Months

Months

Months

4

CO0000078

PPH001

Pink Shoes

CPC

Cost Per Co...

Durban Area

18/06/2018

18/06/2023

Sales Depar...

60 Months

Months

Months

4

CO0000080

OFF001

Office Supplies Unlimited

CPC

Cost Per Co...

Durban Cen...

1234

06/05/2017

06/05/2020

60 Months

Months

Months

2

CO0000079

HOP001

Hope Works (Pty) Ltd

CPC

Cost Per Co...

Durban Area

18/06/2018

18/06/2023

Sales Depar...

60 Months

Months

Months

4

Open Windows

User : Bianca 09/02/2023 Version : 2.5.1.4 Example Company

The **Contract Maintenance** screen will be displayed.

Maintenance for Contract No.: CO0000016 - Status: A - BPO: Version 2.5.1.4 - Example Company

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Save Layout Workspaces Process Format

Links: Enter text to search...

Functions: Notes, Documents, Hold History, Suspend History, Processing: Invoices, Credit Notes

Contract Info

Contract No: CO0000016

Contract Type: Cost Per Copy

Contract Class:

Contract Category:

Start Date: 13/06/2014

End Date: 13/06/2019

Period: 60

Period Type: Months

Department: Sales Department

Contract Manager: Carolina Suzzetta Lourens van de ...

Salesman: Belinda Sharnan

Aggregate Billing: ☐

Hide Fee Detail: ☐

PartCode Description SerialNo AssetRegNo Location ShippingAddress COSAccount SLA/Rate

SP 19-12 SP 19-12 Colour Copier SP 19-12185 Reception 658 Dime Road, South Riding, ... 2101

Contract Info Customer Info Billing Info Rental Info

Open Windows User : Bianca 09/02/2023 Version : 2.5.1.4 Example Company

EDIT CONTRACT DETAILS

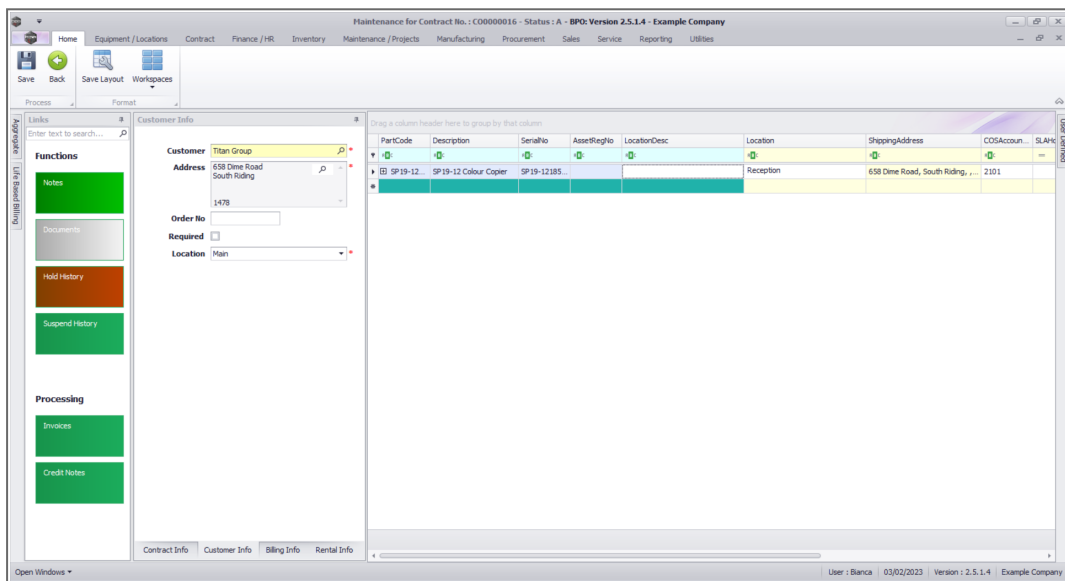
- The **Maintenance for Contract No. : [] - Status: []** screen will open.
- Edit the details, as required.

- Expand the **Information tabs** on the left-hand side of the screen, if those frames contain details that need to be changed.
- Expand the **Items data grids**, if there are details there, which need to be changed.

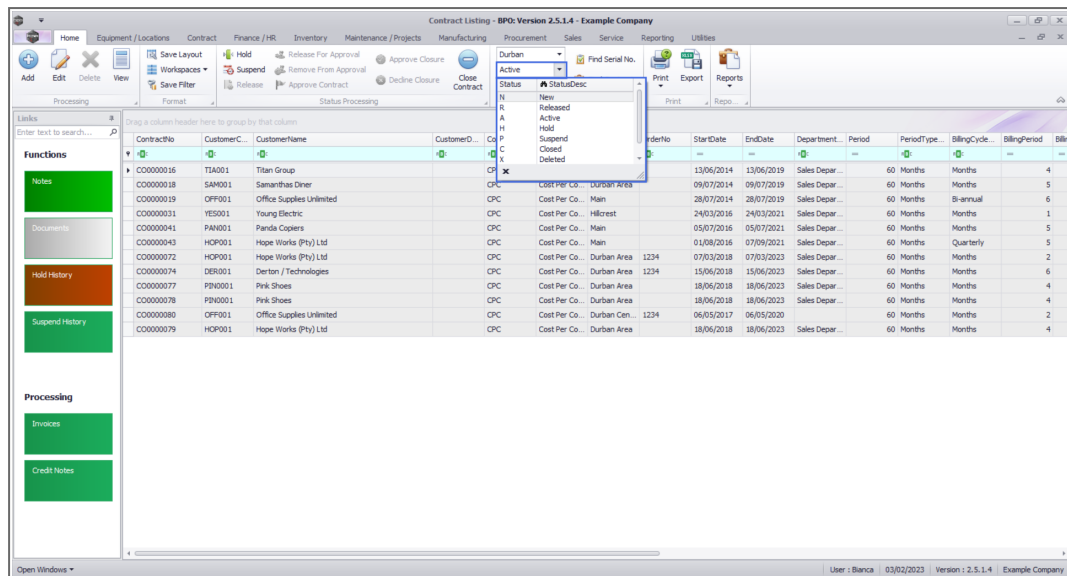
SAVE CHANGES

SAVE THE CONTRACT

- When you are done, click on **Save**.



- The contract will be **saved** and you will return to the **Contract Listing** screen where the status defaults to **Active**, or will be set to the Status you last selected.
- Click on the **drop-down arrow** in the **Status** field and select the relevant status.



ContractNo	CustomerC	CustomerName	CustomerD	ContractStatus	StarDate	EndDate	Department	Period	PeriodType	BillingCycle	BillingPeriod	Billing
CO0000016	TIA001	Titan Group		Active	13/06/2014	13/06/2019	Sales Depart...	60 Months	Months		4	
CO0000018	SAH001	Sananthes Diner		Active	09/07/2014	09/07/2019	Sales Depart...	60 Months	Months		5	
CO0000019	OFF001	Office Supplies Unlimited		Active	28/07/2014	28/07/2019	Sales Depart...	60 Months	Bi-annual		6	
CO0000031	YES001	Young Electric		Active	24/03/2016	24/03/2021	Sales Depart...	60 Months	Months		1	
CO0000041	PAN001	Panda Copiers		Active	05/07/2016	05/07/2021	Sales Depart...	60 Months	Months		5	
CO0000043	HOP001	Hope Works (Pty) Ltd		Active	01/08/2016	07/09/2021	Sales Depart...	60 Months	Quarterly		5	
CO0000072	HOP001	Hope Works (Pty) Ltd		Active	07/03/2018	07/03/2023	Sales Depart...	60 Months	Months		2	
CO0000074	DER001	Derton / Technologies		Active	15/06/2018	15/06/2023	Sales Depart...	60 Months	Months		6	
CO0000077	PPH001	Pink Shoes		Active	18/06/2018	18/06/2023	Sales Depart...	60 Months	Months		4	
CO0000078	PPH001	Pink Shoes		Active	18/06/2018	18/06/2023	Sales Depart...	60 Months	Months		4	
CO0000080	OFF001	Office Supplies Unlimited		Active	06/05/2017	06/05/2020	Sales Depart...	60 Months	Months		2	
CO0000079	HOP001	Hope Works (Pty) Ltd		Active	18/06/2018	18/06/2023	Sales Depart...	60 Months	Months		4	

- **New** contracts can be found within the **New** contract status listing screen.
- From here, the contract will need to be **Released** and then **Approved** before it becomes active.
- **Edited** contracts may either remain in **Active** status or move to **Released** status in order for changes to be reviewed before **Approval** depending on the change made.

MNU.112.009

